

In terms of the Financial Advisory and Intermediary Services (FAIS) Act, 2002

YOUR FINANCIAL SERVICE PROVIDER | FSCA Number: 35134

Physical address: 3rd Floor The Terraces, 25 Protea Road, Claremont, Cape Town, 7708

Tel Number: +27 (0)21 203 0081
Email: info@currencypartners.co.za
Website: www.currencypartners.co.za

LEGAL STATUS OF PROVIDER

Currency Partners (Pty) Ltd was converted to a private limited company, previously trading as a closed corporation (cc) formed in 2008 with CK number 2008/034875/23. Eike Feltz is the sole Director and meets the "fit and proper" requirements, as prescribed by FAIS, to assist you with the financial services offered by Currency Partners (Pty) Ltd.

DETAILS OF KEY INDIVIDUALS

Name: Eike Feltz **Tel Number:** +27 (0)21 203 0081
Email: Eike.Feltz@currencypartners.co.za
Qualifications: BBusSci; RE1 and RE5 regulatory examination passed

Name: Jonathan Racussen **Tel Number:** +27 (0)21 203 0081
Email: Jonathan.Racussen@currencypartners.co.za
Qualifications: BBusSci; RE1 and RE5 regulatory examination passed

DETAILS OF REPRESENTATIVES

Name: Eike Feltz **Tel Number:** +27 (0)21 203 0081
Email: Eike.Feltz@currencypartners.co.za
Qualifications: BBusSci; RE1 and RE5 regulatory examination passed

Name: Jonathan Racussen **Tel Number:** +27 (0)21 203 0081
Email: Jonathan.Racussen@currencypartners.co.za
Qualifications: BBusSci; RE1 and RE5 regulatory examination passed

Name: Lauren Walker **Tel Number:** +27 (0)21 203 0081
Email: Lauren.Walker@currencypartners.co.za
Qualifications: CIB NQF Level 5; RE5 regulatory examination passed

Name: Tania Mancini **Tel Number:** +27 (0)21 203 0081
Email: Tania.Mancini@currencypartners.co.za
Qualifications: Higher Certificate; CIB NQF Level 5; RE5 regulatory examination passed

Name: Brett O'Connor **Tel Number:** +27 (0)21 203 0081
Email: Brett.Oconnor@currencypartners.co.za
Qualifications: Management Dev NQF Level 5; RE5 regulatory examination passed

Name: Gareth Jones **Tel Number:** +27 (0)21 203 0081
Email: Gareth.Jones@currencypartners.co.za
Qualifications: BComm; RE5 regulatory examination passed

Name: Johanna-Mari Pretorius **Tel Number:** +27 (0)21 203 0081
Email: Hanri.Pretorius@currencypartners.co.za
Qualifications: BCom; RE1 and RE5 regulatory examination passed

Name: Jan Hendrik Opperman **Tel Number:** +27 (0)21 203 0081
Email: janhendrik.opperman@currencypartners.co.za
Qualifications: BCom, L.L.B.; RE5 regulatory examination passed

Name: Anton Coetzee **Tel Number:** +27 (0)21 203 0081
Email: Anton.Coetzee@currencypartners.co.za
Qualifications: BCom; RE5 regulatory examination passed

Name: Maya Brown **Tel Number:** +27 (0)21 203 0081
Email: Maya.Brown@currencypartners.co.za
Qualifications: BCom; BComHons; RE5 regulatory examination passed

Name: Angela Paget **Tel Number:** +27 (0)21 203 0081
Email: angela.paget@currencypartners.co.za
Qualifications: RE5 regulatory examination passed, CIB NQF Level 5

DETAILS OF REPRESENTATIVES UNDER SUPERVISION

Name: Luke Crouch **Tel Number:** +27 (0)21 203 0081
Email: Luke.crouch@currencypartners.co.za

Name: Liam Vickers **Tel Number:** +27 (0)21 203 0081
Email: Liam.vickers@currencypartners.co.za

Name: Leigh Holing **Tel Number:** +27 (0)21 203 0081
Email: leigh.holing@currencypartners.co.za
Qualifications: RE5 regulatory examination passed

Name: Annette Le Grange **Tel Number:** +27 (0)21 203 0081
Email: Annette.LeGrange@currencypartners.co.za

Name: Joshua Trope **Tel Number:** +27 (0)21 203 0081
Email: Joshua.Trope@currencypartners.co.za
Qualifications: BCom (Economics); RE5 regulatory examination passed

Name: Nerissa Boonzaaier **Tel Number:** +27 (0)21 203 0081
Email: Nerissa.boonzaaier@currencypartners.co.za

Name: Kirsten Kratz **Tel Number:** +27 (0)21 203 0081
Email: Kirsten.Kratz@currencypartners.co.za
Qualifications: BCoH

Name: Gustav Eichstadt **Tel Number:** +27 (0)21 203 0081
Email: Gustav.Eichstadt@currencypartners.co.za
Qualifications: BCom; RE5 regulatory examination passed

Name: Conrad Nortje **Tel Number:** +27 (0)21 203 0081
Email: Conrad.nortje@currencypartners.co.za
Qualifications: BCom (Marketing & Management)

Name: Kristin Meise **Tel Number:** +27 (0)21 203 5869
Email: Kristin.meise@currencypartners.co.za
Qualifications: BCom, Management Studies

LEGAL STATUS

Licensed as a Financial Service Provider in terms of Section 8 of the Financial Advisory and Intermediary Services Act, 2002 (Act No. 37 of 2002) subject to the conditions and restrictions set out in the license Annexure. Eike, directly or indirectly, holds 10% of a product supplier's shares or have any financial interest in a product supplier. Currency Partners holds Professional Indemnity cover. Copies of these schedules are available on request.

DETAILS OF COMPLIANCE, COMPLAINT PROCESS AND FAIS OMBUD

Currency Partners compliance

Masthead (Pty) Ltd is our appointed Compliance Officer

Address: 1st Floor, Gijima Terraces, Golf Park (off Raapenberg Road), Mowbray, 7700
Tel Number: +27 (0)21 686 3588 **Fax Number:** +27 (0)21 686 3589
Email: info@masthead.co.za

CURRENCY PARTNERS COMPLAINTS AND CONFLICTS OF INTEREST

If you have a complaint related query, please do not hesitate to contact our complaints department on 086 002 2007. Megan Charlier will be able to assist you and provide you with full details of Currency Partners' complaints handling process, if so required. A copy of our complaints resolution policy and a copy of our policy on management of conflicts of interest together with the conflicts registers are available for perusal on request. Should a complaint not be resolved to your satisfaction, you may forward such complaint to the Office of the Ombud for Financial Services Providers.

OMBUD FOR FINANCIAL SERVICES PROVIDER

Address: PO Box 74571, Lynnwoodridge, 0040
Tel Number: 086 032 4766 **Fax Number:** +27 (0)12 348 3447
Email: info@faisombud.co.za

CONFIDENTIALITY

All information furnished by the client to Currency Partners shall be treated as confidential and shall be used only for the purpose of providing financial advice and rendering of intermediary services. Neither Currency Partners nor any of its representatives, key individuals or staff may disclose any confidential information acquired or obtained from a client or product supplier, subject to FAIS section 4(1), in regard to such client or supplier, unless the written consent of the client or product supplier has been obtained beforehand or disclosure of the information is required in the public interest or under any law.

Currency Partners (Pty) Ltd

T +27 (0)21 203 0081 **E** enquiries@currencypartners.co.za **W** currencypartners.co.za

CT The Terraces, 25 Protea Road, Claremont, 7806 Cape Town **JHB** 16 Baker Street, Rosebank, 2196 Johannesburg

DBN Unit 5, Block 3, MRM Office Park, 10 Village Rd, Kloof, 3610 Durban

Directors E J Feltz & B V Voogt **Reg No.** 2015/374045/07 **VAT No.** 4890269311

Licensed by the FSCA as an authorised Financial Services Provider (No. 35134). Authorised by the SARB to act as a Foreign Exchange Intermediary (No.1431).

OTHER MATTERS OF IMPORTANCE

1. Do not sign any blank or partially completed application forms. Do not leave blank spaces. Keep and read all documents handed to you.
2. In terms of the Financial Intelligence Centre Act, Currency Partners is obliged to report any suspicious and unusual transactions that may facilitate money laundering.
3. It is important that you are absolutely sure that the transaction meets your needs and that you have all the information you need before making a decision.

FINANCIAL SERVICES AND PRODUCTS

As an authorised Financial Services Provider, Currency Partners has been licensed by the Financial Services Conduct Authority in terms of the FAIS Act, to render advice and intermediary services in respect of the following financial products:

Category Description	Advice	Intermediary
Category I		
Securities and instruments: Derivative instruments	X	X
Deposit Defined in the Banks Act—exceeding 12 months	X	X
Deposit Defined in the Banks Act—12 months or less	X	X

I have a contractual relationship with and I am authorised to recommend the products covered in my letters of authority with the following insurers / investment houses:
Investec (Foreign exchange and deposits); **Mercantile** (Foreign exchange and deposits);
Bidvest (Foreign exchange and deposits).

TREATING CUSTOMERS FAIRLY POLICY

Our Treating Customers Fairly policy is centered around the guidelines provided by the Financial Sector Conduct Authority to ensure we consistently deliver fair outcomes to our clients and take responsibility for the business and staff providing an enhanced service quality to clients, based on a culture of openness and transparency. As a business, we take the requirements of the FSCA seriously, in particular, the requirement to treat customers fairly.

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